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SUPERMARKET BUSINESS

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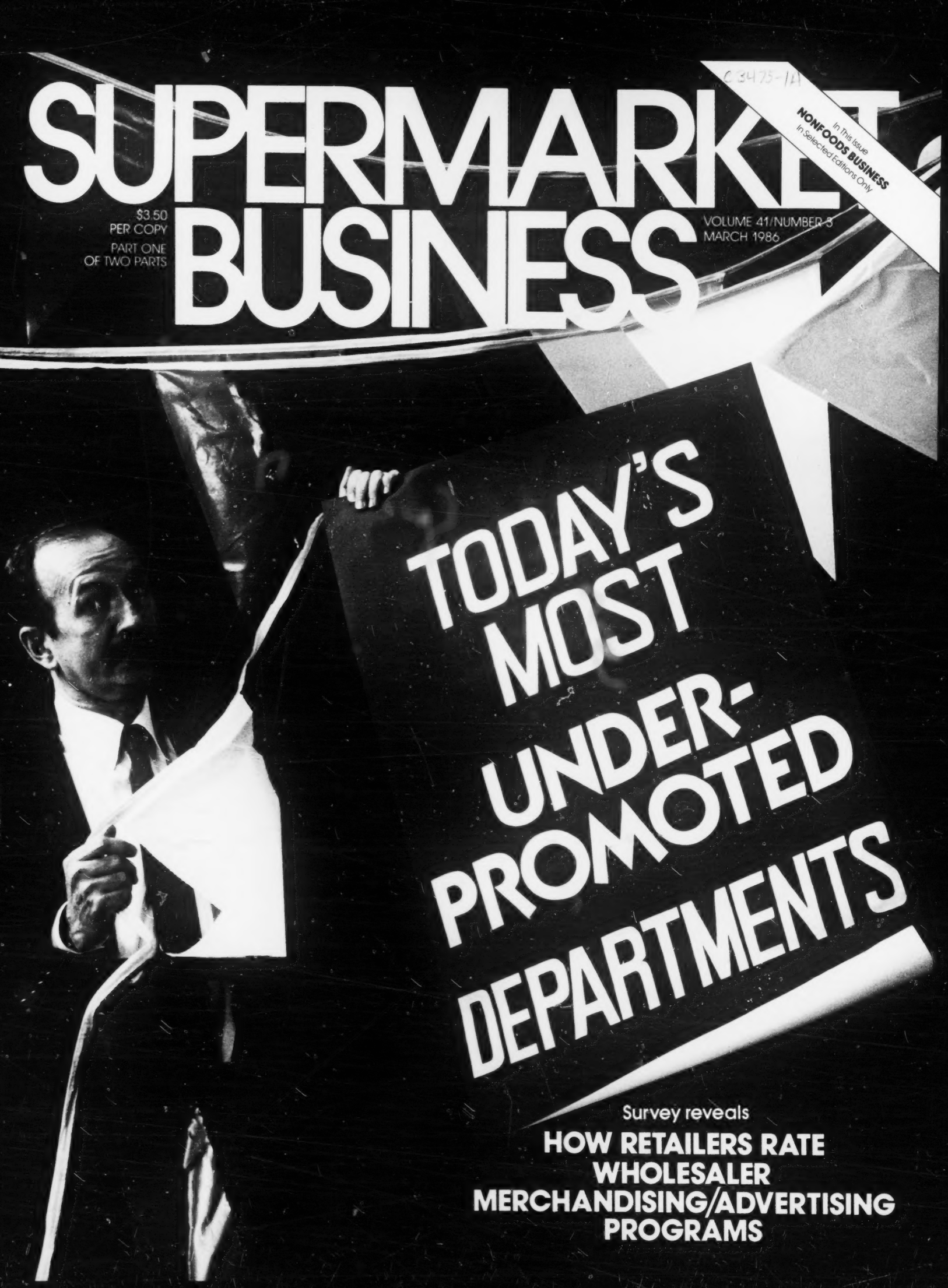
OF TWO PARTS

VOLUME 41/NUMBER 3
MARCH 1986

In This Issue
NONFOODS BUSINESS
In Selected Editions Only



TODAY'S MOST UNDER-PROMOTED DEPARTMENTS

Survey reveals

HOW RETAILERS RATE WHOLESALER MERCHANDISING/ADVERTISING PROGRAMS

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SUPERMARKET BUSINESS

VOLUME 41
NUMBER 3
PART ONE
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MARCH 1986

HOW RETAILERS RATE WHOLESALER MERCHANDISING/ ADVERTISING PROGRAMS/A STAFF REPORT **25**

Many retailers say wholesalers seem to be wanting in their merchandising, promotional and advertising programs for what should be some of the fastest-growing departments in the supermarket. This survey draws on a sample of independent retailers to rate the number and scope of programs offered by their wholesalers; the quality of the programs; the quality of weekly newspaper ads and circulars; and total ad space allotment for each department.

"PUT ME IN, COACH, I'M READY TO PLAY!"/KEVIN COUPE **31**

From basketball coach to supermarket owner, Jim Bauersfeld is meeting the challenge of success. Bauersfeld talked with SUPERMARKET BUSINESS about some of the qualities it takes to produce a winning team—on the court or in the store.

SHOPPERS' TASTE FOR FROZENS CONTINUES TO HEAT UP/PETER LEVITEN **39**

Long identified with the bland, conventional TV dinner, frozen foods are reaching a new level of sophistication. Consumers, eager for more variety and better quality, are no longer willing to compromise for simple convenience.

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HOW DO SUPERMARKETS' HOUSEWARES STACK UP? **5B**

HOUSEWARES AT STARN'S SHOPRITE: QUALITY, VARIETY AND CROSS-MERCHANDISING ADD UP TO HEALTHY SALES/PETER LEVITEN **11B**

JM BAUERSFELD'S RIDES THE CREST OF THE NONFOODS WAVE/KEVIN COUPE **15B**

ALSO IN NONFOODS BUSINESS:
SAMI UPDATE **21B**
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*IN SELECTED EDITIONS ONLY

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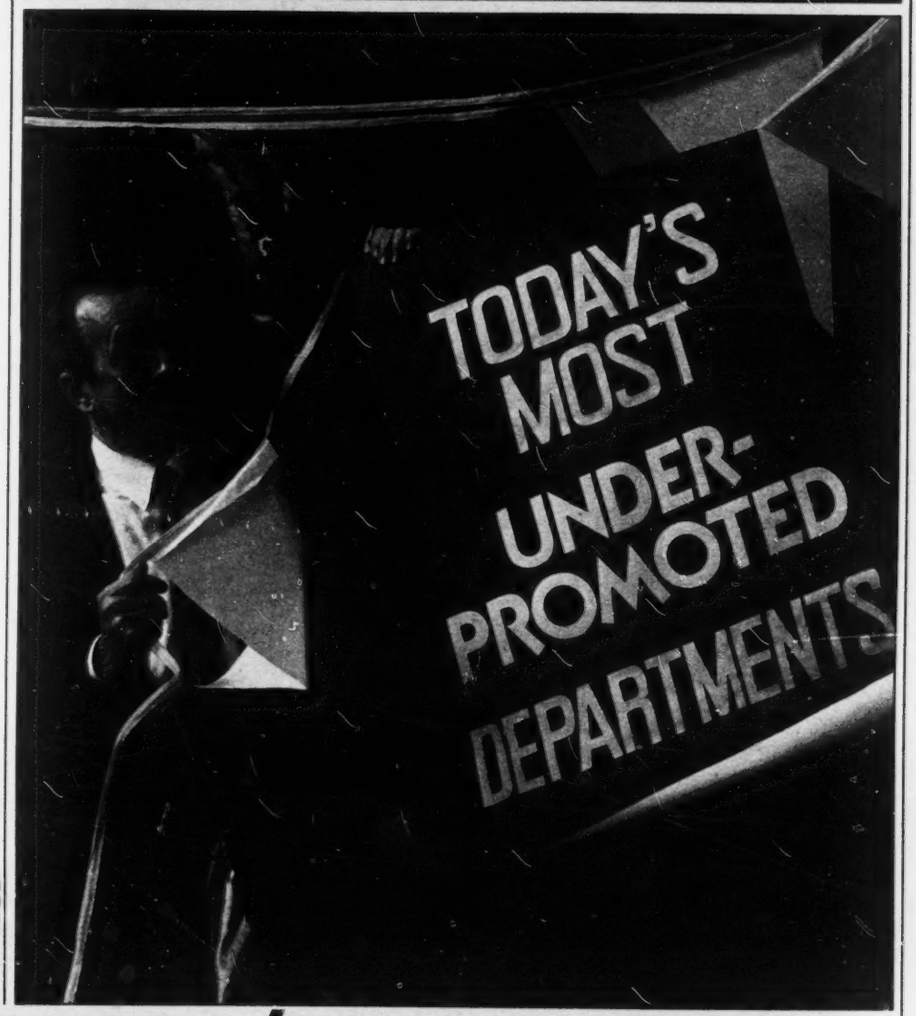


HOW RETAILERS RATE WHOLESALER MERCHANDISING/ADVERTISING PROGRAMS

A STAFF REPORT

If you want to know what independent retailers consider the most under-promoted departments in the supermarket today, think of some of the fastest-growing departments: instore bakery, service deli, general merchandise and health & beauty aids. Of course, the basic business of supermarkets is the grocery department, but should the total balance be rethought?

Many independent retailers who responded to a SUPERMARKET BUSINESS survey seem to feel that wholesalers are maintaining an increasingly obsolete status quo in their merchandising, promotional and advertising programs. Survey results, which appear on the following pages, show that traditional categories, such as dry grocery (both national and private label) and national brand frozens and dairy, appear to receive the most solid support back at the warehouse, compared with the store's total product mix.

The relatively meager promotional support for new service departments might be a result of the paltry manufacturer promotional money behind them. This certainly seems to influence retailer feelings about voluntary- and co-op-supplied ad programs. Again, the new service departments (along with produce) are not seen as getting enough support. One retailer writes, "Ads are placed only to qualify for manufacturer ad money. No thought is given to merchandising."

This probably comes as no surprise to many

Continued on page 30

Many independent retailers feel that their wholesalers are not responding quickly enough to changes in supermarkets today. This survey reveals what independents would like to see.

MERCHANDISING/PROMOTIONAL

NUMBER AND SCOPE OF PROGRAMS

CO-OPS

% Who Offer	Rank		Rating
100.0	1	Dry Grocery (NB)	5.67
96.9	2	Dry Grocery (PL)	5.57
98.9	3	Frozens (NB)	5.54
92.7	4	Dairy (NB)	5.38
91.7	5	Dairy (PL)	5.27
95.8	6	Meat	5.08
91.7	7	Frozens (PL)	5.07
86.4	8	Produce	4.88
89.0	9	HBA (NB)	4.84
74.4	10	GM	4.68
65.2	11	HBA (PL)	4.55
76.5	12	Service Deli	4.50
65.4	13	Instore Bakery	4.15
		Total Product Mix	5.35

POOR 1.0 — 4.0 — 5.0 — 6.0 — EXCELLENT 7.0

VOLUNTARIES

% Who Offer	Rank		Rating
100.0	1	Dry Grocery (NB)	5.49
94.8	2	Frozens (NB)	5.43
97.4	3	Dry Grocery (PL)	5.27
91.6	4	Dairy (NB)	5.25
98.0	5	Meat	5.08
92.5	6	HBA (NB)	4.92
84.1	7	Produce	4.91
89.3	8	Frozens (PL)	4.69
91.4	9	Dairy (PL)	4.53
84.4	10	GM	4.50
75.7	11	Service Deli	4.32
73.0	12	Instore Bakery	4.19
76.2	13	HBA (PL)	4.14
		Total Product Mix	5.18

POOR 1.0 — 4.0 — 5.0 — 6.0 — EXCELLENT 7.0

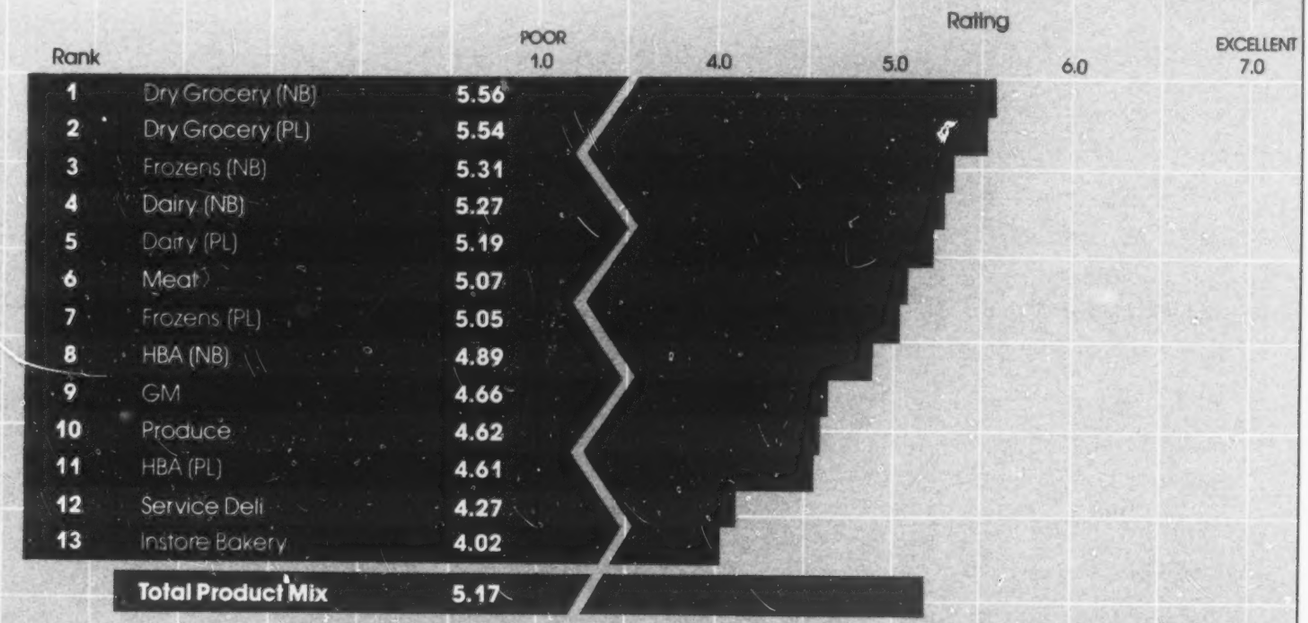
NB National Brand PL Private Label

That supermarket standby—dry grocery in both private label and national brand—continues to receive the most merchandising and promotional support from both co-op and voluntary wholesalers, retailers feel. National brands of both frozens and dairy are also thought by retailers to receive support above the level achieved by the store's "total product mix." But promotional support is perceived as relatively skimpy for today's growing departments—service deli, instore bakery, general merchandise and health & beauty aids. Although these four are becoming more important for a store's image and profit, the promotional support they receive is felt to be relatively "poor."

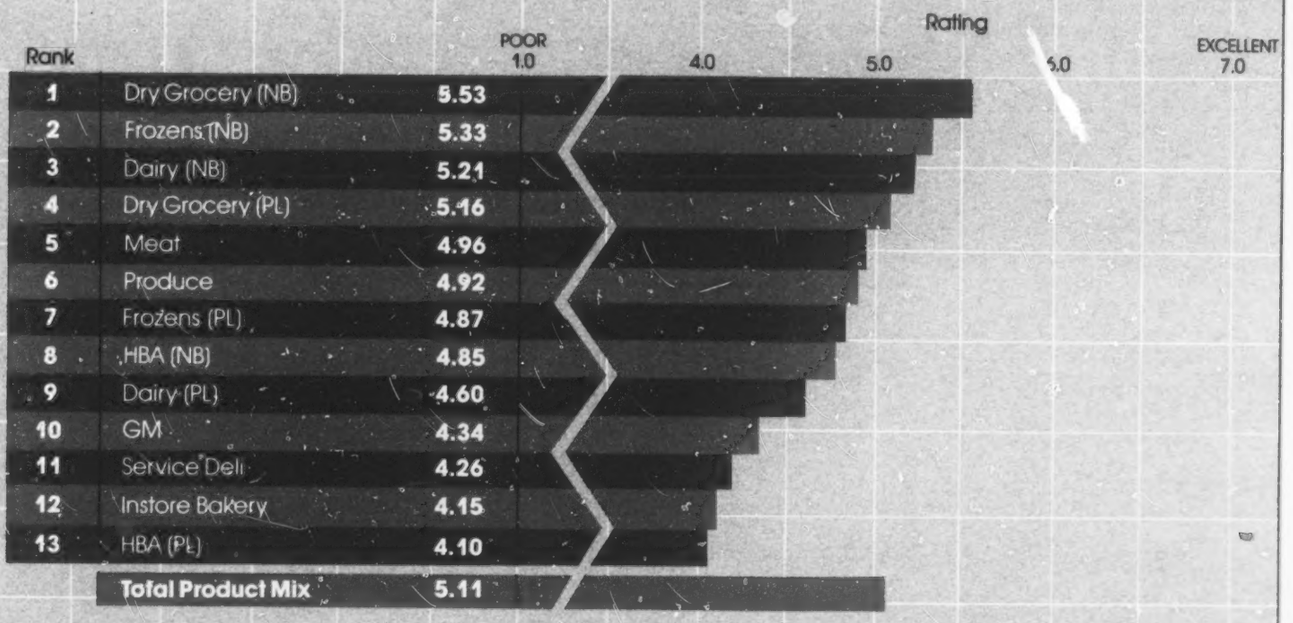
PROGRAMS

Independent retailers rate most highly programs from co-op and voluntary wholesalers for such established categories as dry grocery, and show significantly less enthusiasm for how service and nonfoods sections are promoted.

QUALITY OF PROGRAMS



Rank		
1	Dry Grocery (NB)	5.56
2	Dry Grocery (PL)	5.54
3	Frozens (NB)	5.31
4	Dairy (NB)	5.27
5	Dairy (PL)	5.19
6	Meat	5.07
7	Frozens (PL)	5.05
8	HBA (NB)	4.89
9	GM	4.66
10	Produce	4.62
11	HBA (PL)	4.61
12	Service Deli	4.27
13	Instore Bakery	4.02
	Total Product Mix	5.17



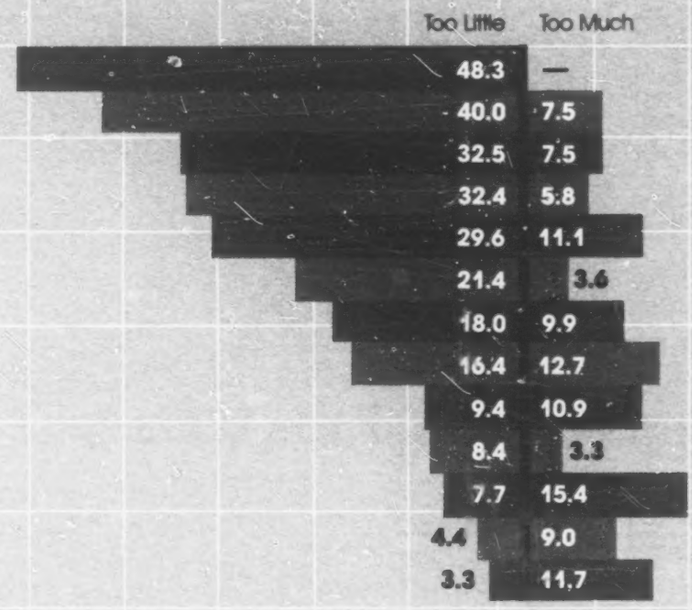
Rank		
1	Dry Grocery (NB)	5.53
2	Frozens (NB)	5.33
3	Dairy (NB)	5.21
4	Dry Grocery (PL)	5.16
5	Meat	4.96
6	Produce	4.92
7	Frozens (PL)	4.87
8	HBA (NB)	4.85
9	Dairy (PL)	4.60
10	GM	4.34
11	Service Deli	4.26
12	Instore Bakery	4.15
13	HBA (PL)	4.10
	Total Product Mix	5.11

Retailers give their highest rating for the quality of wholesalers' merchandising and promotional programs to established categories such as dry grocery (both national brand and private label) and to national brand frozens and dairy. Perhaps not entirely coincidentally, the lowest satisfaction with the quality of programs coming through the pipeline to independents is centered on instore bakery, service deli and general merchandise and HBA—sections with a relatively low incidence of supplier promotional monies.

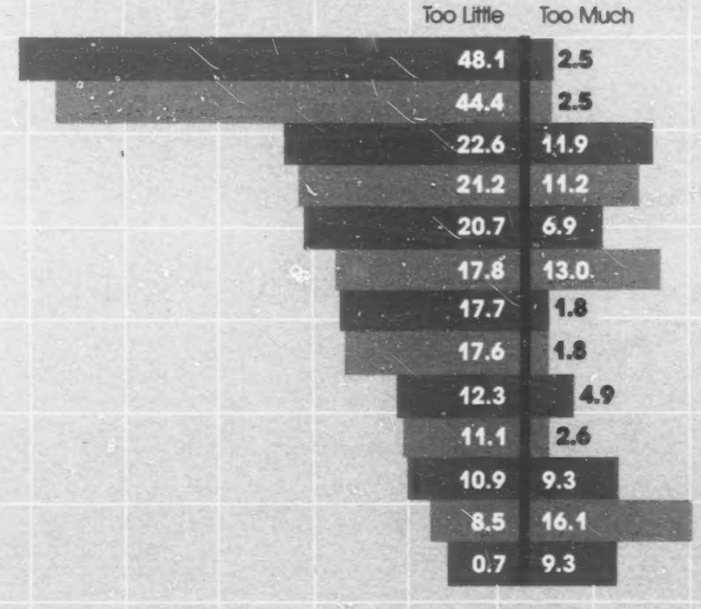
ADVERTISING

SHARE OF AD SPACE

CO-OPS



VOLUNTARIES



NB National Brand PL Private Label

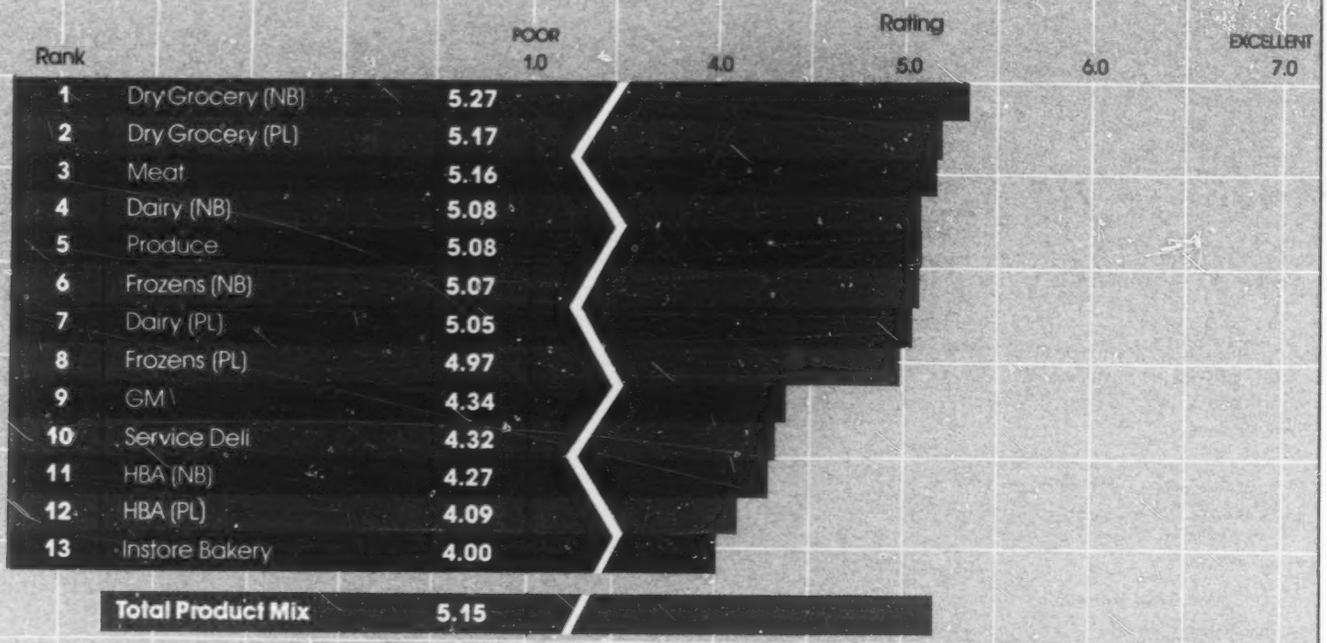
Many independents feel that today's growing departments, especially the instore bakery and service deli, receive far too small a share of space in ads prepared by their wholesaler.

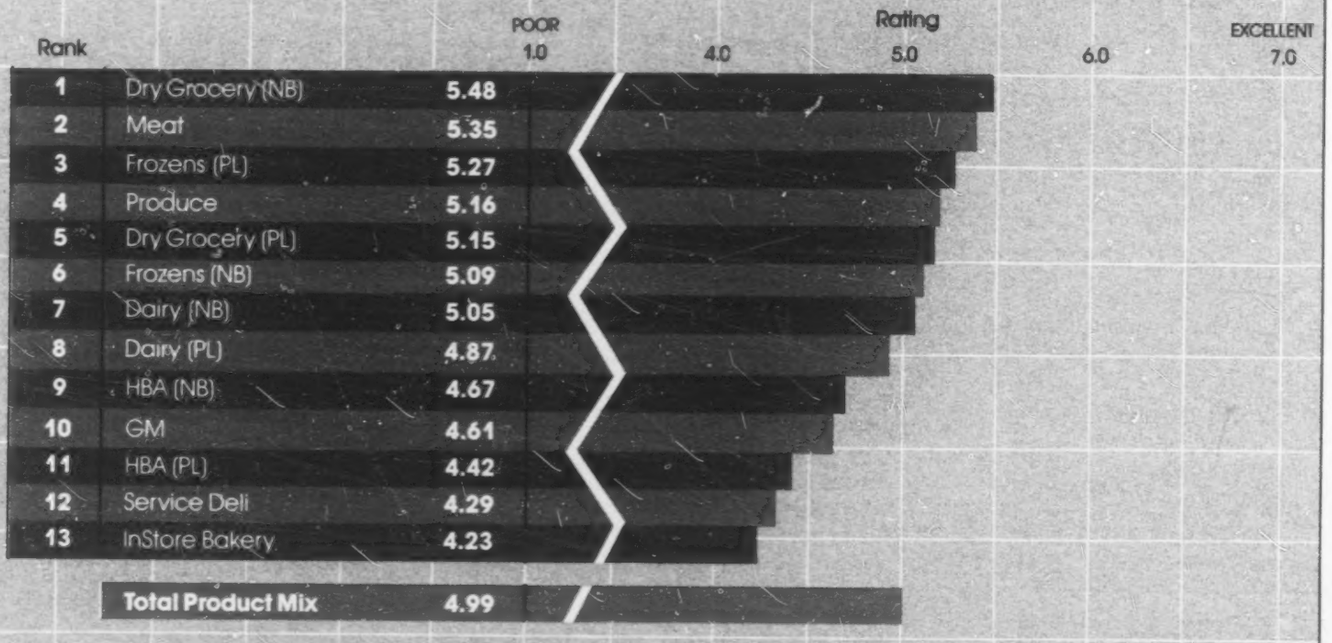
Voluntary and co-op wholesalers are also felt to allot too little space to general merchandise and to private label and national brand health & beauty aids. Produce, another increasingly popular department, is perceived as getting too little space by one in five independents. Where would the extra space come from? Several vote for reducing space for national brand or private label dry grocery and meat.

PROGRAMS

QUALITY OF PRESENTATION

Many independents feel that the instore bakery and deli receive far too small a share of space in wholesaler-supplied ads.





Comments from independents often point to the poor physical quality of ad presentation. Some say the ads are too crammed, others that the appearance and general layout lack creativity. Relative to the "total product mix," the service departments get the lowest marks. And although retailers want more ad space for produce from their wholesalers, the quality of presentation compares favorably with that for the total product mix. On the following page, retailers suggest how to improve the quality of ads.

RETAILER SURVEY

Many retailers feel that too many items are crammed into the ad, and that space is poorly allocated among products.

Here's a sample of some quotes we received from independent retailers on what they did or did not like about their wholesaler-supplied ads. Most retailers said that the ads were far too crowded with items. Others bewailed the stultifying lack of creativity.

TOO MANY ITEMS CRAMMED INTO THE AD

"The wholesaler must put too many items into the ad that are not volume items in order to generate money to help pay for the ads."

"Too many items in the ads! This leaves the ad looking cluttered as well as making it difficult to order." (Many retailers wrote this.)

"There are too many items in their special roto ads. It's impossible for a retailer to do his merchandising to satisfy customers."

"In addition to too many items, there's a bad mix of too high or too cheap pricing. It's a bad mix of loss leaders and regular priced items."

SPACE IS POORLY ALLOCATED AMONG PRODUCTS

"There's too much emphasis on meat. Also too much on dry grocery. The ads should highlight the rest of the perimeter more. Also more HBA and GM."

"Too much emphasis on non-essential items in the ad that are there as "fillers" in creating a false gross profit for the ad. Especially in meat, produce and grocery. We do far too many unnecessary price changes in order to prepare for the ad."

"They feature and co-feature the wrong items in the ad. There's not enough emphasis on produce, bulk foods, bakery, deli and service."

"Costs allotted to items that don't move."

"Deli and bakery items do not tie in with the rest of the ad. Also, HBA ads do not tie in. We must spend extra money to advertise what we have going on in our stores."

"Not enough emphasis is placed on the deli and bakery departments. They only have two to three items as liners for each department, and that's not enough to promote those departments. Our location is suburban, with plenty of fast food/sit-down restaurants."

"There are too many meat items on sale. It makes it hard to show proper profit percentage."

PRICE CUTS ARE TOO DEEP

"The prices they set—such as sugar 40 cents below cost, coffee 40 cents below cost—are a problem."

"Sometimes, ad prices are set too low, and the overall gross profit percentage on sale items is lower than wanted or requested from the retailer."

"In ads which they (wholesalers) set, prices in the produce department are set below cost on several items."

"Markdowns are too deep."

"There's a bad mix of loss leaders and regular prices. Sometimes we have too many loss leaders that are too much of a loss."

"Too much national brand negative gross. Not a good mix."

"They do an excellent job promoting, but the markdown is too high."

POOR APPEARANCE, LAYOUT; LACK OF CREATIVITY

"Little imagination. No fresh ideas. They wait for complaints— they do not respond."

"The Christmas roto ad, to use an example, was bad. Pictures were not clear. Words were printed too small. It looked bad, and didn't say anything about Christmas."

"Ads are not lively. Just a 'listing of items.' No good slicks of fresh foods. There's not an attractive eye-catcher."

"They seem to pull a file and repeat and repeat. They need to be more innovative."

THE SAME ITEMS ARE REPEATED TOO FREQUENTLY

"It seems like they're trying to clear out the warehouse. They show the same items too much."

"There's no flexibility. The same items. No excitement. They're dog items (slow-moving, odd-brand items) that are advertised."

"Too conformative. The same products run time and time again! One roto ad per month—this is too often. It is losing its effect. They also don't tie in with national promotion and advertising enough."

"A problem is having items on sale too often. They have the same brands all the time, especially dry goods."

ITEMS CHOSEN ON THE BASIS OF HOW MUCH THE WHOLESALER CAN GET IN MANUFACTURER ALLOWANCE

"When offered, there is too much emphasis on manufacturers' products paying for space. A better mix could otherwise be achieved."

"The ad is written from the point of view of the wholesaler, and for the wholesaler's benefit. Not for the customer's advantage."

"I feel the ads were made with warehouse profits in mind, and not so much the retailer's profits or sales. Too many items and a bad mix of too-high or too-cheap pricing. There's a bad mix of loss leaders and regular prices."

"There are too many different items, many we never carry. They feature many slow-selling items. They get the advertising money and we don't get the sales from it or any extra money."

"Too many items are just put in to 'move' merchandise from the manufacturer; not true 'draw' items."

PRICING IS NOT COMPETITIVE OR CURRENT; LEAD TIME IS TOO LONG

"Prices are not competitive to the local area."

"We have not used our warehouse ad programs as regularly because of the marketing area (intense). We have instituted an advertising group in our area to custom-fit our needs. There are nine stores in the Toledo area. We have a very high mix, and are tailor-made for streamlined competition. An advertising group with warehouse backing."

"Ads are prepared too far in advance. Prices may not be competitive at the time of ad." ■

INTRODUCTION

Continued from page 25

retailers. But if the instore bakery, service deli, GM/HBA and produce departments are the ones that increasingly draw shoppers into the store, does this mean wholesalers must now re-think their ad approach? What departments should be given less coverage? And how should the ads themselves—which many retailers feel are poorly executed and thought-out—be changed?

(NOTE: A randomly selected sample of independent retailers was asked to *rate*—on a scale of 1 [POOR] to 7 [EXCELLENT]—the number and scope of merchandising and promotional programs offered by their wholesalers, as well as the quality of those programs for each of 13 departments and the overall product mix. On the same scale, they rated the quality of the weekly newspaper ads and circulars prepared for them by their wholesaler, as well as whether each department was getting too little, adequate or too much of a share of total ad space.) ■

NonFoods BUSINESS

HOW DO SUPERMARKETS' HOUSEWARES STACK UP?
A STAFF REPORT **5B**
A lot stacks up quite nicely. Although many consumers are still unwilling to purchase high-ticket items, they do buy cookware and bakeware at supermarkets. Shoppers say the quality often compares favorably with that of other stores, such as discount and department stores. What they would like to see more of, though, is variety and a choice of colors.

HOUSEWARES AT STARN'S SHOPRITE: QUALITY, VARIETY AND CROSS-MERCHANDISING ADD UP TO HEALTHY SALES/ PETER LEVITEN **11B**
Following an extensive remodeling of his Ventnor, N.J., ShopRite, Stan Starn has added an impressive housewares selection. With the right mix, and the best way of merchandising it, Starn seems to be making it pay off.

JM BAUERSFELD'S RIDES THE CREST OF THE NONFOODS WAVE
KEVIN COUPE **15B**
At JM Bauerfeld's in Topeka, the first and last thing the customers see when entering and exiting the store is nonfoods. Although owner Jim Bauersfeld acknowledges that food is first, he believes that proper merchandising of the nonfood items can help his store turn the profits it needs to be successful.

SAMI UPDATE **21B**
NEW PRODUCTS **26B**

A couple of ways to double your WD-40® profits.

Sell two cans with each transaction.

The WD-40 Double Take Sweepstakes promotion means double the sales, double the traffic and double the profits.

A total of $80,000 in cash and shopping sprees will be given away. Your customers could win lots of shopping spree dollars to spend *in your store.*

So get ready for heavy traffic. Order your WD-40 Double Take Sweepstakes display now.

WD-40 Co., San Diego, CA 92110.

SAMI UPDATE

HBA Products Rebound in December Food Store Sales As Books Are Closed on 1985

BY ALAN MILLER, JR.

For HBA, 1985 will go down as a growth year, with more peaks than valleys, both from month to month and from category to category.

In the aftermath of an alarming posting of multi-category sales losses during SAMI's November reporting period, the year-end period ended Jan. 3, 1986, saw a return to health and beauty aid (HBA) trends with a preponderance of pluses rather than minus percentages.

In all 50 HBA categories tracked by SAMI combined, the 28-day unit volume rose 2.6 percent over the level registered in the corresponding year-ago period. This tonnage gain was topped only by the 6.4 percent poundage increase among refrigerated foods. There were four-week tonnage declines in two of the five SAMI product departments: a loss of 0.7 percent for dry grocery:nonfood items and a decline of 0.1 percent in the poundage of frozen foods.

On a dollar basis, the four-week increase of nearly 30 million, or 5.7 percent, for HBA represented the highest gain rate of any SAMI product department. The dollar gain for all categories measured by SAMI was 4.4 percent, the same increase as that for refrigerated foods, and higher than 3.2 percent for dry grocery:nonfood and 1.8 percent for frozen foods. Dollar sales of dry grocery:food categories combined rose 4.8 percent in the four-week period ended Jan. 3. HBA also enjoyed the highest increase rate in annual dollar volume as a result of a 6.9 percent gain rate. The second highest dollar gain rate belonged to grocery:nonfood items, where the increase amounted to 5.2 percent. Dollar sales of both dry grocery and frozen food departments each increased 3.8 percent over 1984 food store sales levels.

Gains 7, losses 1

Whereas HBA product groups were evenly divided in gains and losses during the preceding reporting period, in the final period for the year the score was 7 to 1, gains over losses. The sales decline was registered in the oral hygiene group, where all six product categories measured by SAMI fell in the negative column, resulting in a 3.1 percent decline for this product group. By far the strongest performance was the 22.3 percent hike in unit sales in the skin care aids product group.

On a product category basis, four-week unit gains were found in 30 and losses in 20. This represents a strong recovery from the ratio of 32 to 18 losses over gains during the month of November (SAMI reporting period ended Dec. 6, 1985).

Among baby needs, the only four-week loss rate was the 8.2 percent decline for infant clothes; however, this is the lowest in several months. The annual loss rate stands at 11.1 percent. Food store sales of baby oils, creams and lotions moved from a loss rate of 2.9 percent in the preceding four-week period to a gain of 7.3 percent as the curtain was drawn on 1985.

In the deodorant product group, for the fourth consecutive, 28-day period, losses and gains were registered in the same categories. Overall, the gains more than wiped out the losses, and the current gain rate for all deodorants combined was 2.4 percent, which compares with 2.5 percent in the just-prior period. Deodorant and antiperspirant sticks, which rose 1.3 percent, gained volume from sprays (-3.9 percent), roll-ons (-2.6 percent) and creams (-13.5 percent). Feminine hygiene deodorants fell 4.2 percent, and all four of these weak categories were also in arrears on a 52-week unit volume basis. There was a continuing rate of gain in the case of deodorant and talcum powders, and favorable trends were seen for foot deodorants and athlete's foot remedies (+1.5 percent) and douches (+4.0 percent).

Turnaround for first aid

Contrasting with loss rates among first aid categories in the previous period were small turnarounds for both first aid antiseptics (+0.4 percent) and first aid products (+2.2 percent)

The gain rate for hair care needs was 5.3 percent in all seven product categories combined, a modest improvement from the gain of 3.7 percent during November. There was an upswing rate of 1.9 percent for shampoos, the highest volume category in the product group. Four-week food store unit volume among hair sprays increased 837,000, while hair setting needs, reflecting still more new product proliferation among hair styling mousses, added 771,000 units, representing a percentage increase of 46.7 percent. Gains of 2 to 3 percent were found among hair conditioning rinses and hair dressing needs (mostly male-oriented products). An identical loss rate (-6.3 percent) was registered in the home permanent kits and hair coloring categories.

The most worrisome trouble spot in this HBA section is still among oral hygiene products. In the period just ended, there were losses in all six categories for which more than two years of SAMI data are on record (dental aids is a new SAMI category, and current sales are not included in the totals). In spite of promotional efforts behind plaque- and tartar-reducing brands and pump dentifrice dispensers, there has been continuing weakness in the sales of toothpaste gels and powder. However, the most recent four-week trend, showing a loss of 2.3 percent, reflects a reduction in the loss rate percentage vis-a-vis recent months. On the other hand, the rate of decline among mouth washes has accelerated, and volume of both denture cleaners and denture adhesives are trending downward for the four weeks, 12 weeks and annually, with no signs of turning around. Recent new products in these two categories have not enjoyed lasting success. Sales of toothbrushes (-0.8 percent) are in the loss column for the first time in recent months.

Proprietary remedies up

In the preceding period, there were sales improvements in only three out of 13 proprietary remedy categories tracked by SAMI. In the current period, nine categories had gains and four had losses. The declines were noted among internal analgesics (-2.3 percent), nasal sprays-drops-inhalers (-3.8 percent), laxatives and stool softeners (-1.9 percent), and a loss of 10.6 percent in the nearly extinct proprietary tranquilizer category.

Categories that moved from the preceding period minus column to a plus status included external analgesics (from -6.7 percent to +4.8 percent), cold tablets (from -2.3 percent to +9.8 percent), chest rubs (from -10.8 percent to +4.2 percent), synthetic vitamins (from -4.4 percent to +1.3 percent) and appetite suppressants (from -15.5 percent to +7.0 percent). Sales of sleeping aids and eye care products were ahead of year ago levels in both reporting periods.

In the shaving needs prod-

uct group, two categories incurred loss rates in the two consecutive periods, but both pre-shave lotions (-3.0 percent) and after-shave lotions (-3.4 percent) had reduced rates of loss when compared with November performance. Razor blades, as a result of a continuing strong showing for disposables, gained 3.7 percent, an improvement over the 2.1 percent gain rate seen the month before.

Finally, saving the best until last, volume in three of the five skin care aids categories improved more than 20 percent: 20.4 percent for hand and body creams and lotions, 25.9 percent for facial preparations and 50.6 percent for lip care products. In all three of these categories, there was trend improvement, including changes from minus to plus for hand and body creams and lotions and lip care products, which in November suffered losses of 2.2 percent and 2.0 percent, respectively. A gain of 3.5 percent for suntan lotion-suntan oil does not translate to many sales dollars during the fourth quarter of the year, due to the high seasonality factor among these products. The loss rate of 6.2 percent for cosmetic and medicated skin aids is in part a reflection that there were no important new products launched in this category during 1985.

All in all, 1985 will go down as a growth year with more peaks than valleys, both from month to month and from category to category. Part of the scenario for the 1986 performance of HBA will be witnessed when the post-holiday outpouring of new products is evaluated. As always in this product department, weather and health considerations will play important roles in the new year's sales trends. ■

HEALTH & BEAUTY AIDS: SAMI FOUR-WEEK FOOD STORE UNIT TRENDS VS. YEAR AGO

PRODUCT GROUP AND CATEGORY	% CHANGE VS. YEAR AGO 4 WEEKS ENDING 1/18/86	4 WEEKS ENDING 12/21/85	4 WEEKS ENDING 1/13/84
BABY NEEDS	+ 1.4%	– 1.3%	+ 2.8%
Baby Powders	– 4.2	+ 3.6	+ 0.5
Baby Oils, Creams & Lotions	+ 3.5	– 2.9	+ 7.3
Infant Clothes	– 9.2	– 11.6	– 5.2
Nursing Supplies	+ 5.3	+ 1.0	+ 2.3
DEODORANTS	+ 1.1%	+ 2.5%	+ 2.4%
Sprays	– 5.3	– 3.7	– 3.9
Roll-On	– 4.6	– 7.6	– 2.6
Stick Deodorants & Pads	+ 17.2	+ 15.5	+ 11.3
Creams	– 13.3	– 13.7	– 13.5
Deodorants & Talcum Powders	+ 7.1	+ 8.2	+ 9.1
Feminine Hygiene Deodorants	– 8.4	– 10.2	– 4.2
Foot Deodorants & Athlete's Foot Remedies	+ 9.5	+ 1.7	+ 1.5
Feminine Douches	+ 5.9	+ 4.5	+ 4.0
FIRST AID	+ 2.7%	– 0.4%	+ 4.8%
Antiseptics	+ 4.2	– 1.6	+ 0.4
First Aid Products	+ 3.1	– 0.1	+ 2.2
HAIR CARE NEEDS	+ 7.8%	+ 5.7%	+ 5.3%
Shampoos	+ 1.7	+ 0.7	+ 1.9
Hair Sprays	+ 18.3	+ 9.8	+ 10.8
Hair Conditioning Needs	+ 4.6	– 0.1	+ 2.4
Hair Setting Needs	+ 40.4	+ 32.7	+ 46.7
Home Permanent Kits	+ 10.0	– 0.7	– 6.3
Hair Coloring	+ 7.7	– 5.7	– 6.3
Hair Weaving Needs	+ 9.6	+ 2.6	+ 2.8
ORAL HYGIENE	– 3.8%	– 4.4%	– 3.1%
Toothpastes & Powders	– 6.2	– 5.3	– 2.3
Mouthwashes	– 5.3	– 2.8	– 5.9
Breath Fresheners	– 8.6	– 13.1	– 13.2
Denture Cleaners	– 1.1	– 7.9	– 6.5
Denture Adhesives	– 5.2	– 7.6	– 4.8
Toothbrushes	+ 10.9	+ 0.7	– 0.8
PROPRIETARY REMEDIES	+ 2.7%	– 3.4%	+ 1.7%
Antacids	+ 3.5	+ 2.9	+ 3.5
Internal Analgesics	– 2.7	– 3.6	– 2.3
External Analgesics	+ 2.0	– 6.7	+ 4.8
Cold Tablets	+ 8.6	– 2.3	+ 9.8
Nasal Sprays—Drops—Inhalers	+ 3.0	– 8.8	– 3.0
Chest Rubs	+ 1.3	– 10.8	+ 4.2
Cough Remedies	+ 3.3	– 10.0	+ 0.2
Laxatives	+ 1.8	– 0.9	– 1.9
Sleeping Aids	+ 12.1	– 7.8	+ 10.8
Tranquilizers	– 9.9	– 10.9	– 10.6
Feminine Vaginals	– 1.0	– 4.4	+ 1.3
Eye Care Products	+ 22.5	+ 0.5	+ 11.1
Appetite Suppressants	– 2.2	– 15.1	– 7.0
SHAVING NEEDS	+ 4.4%	+ 1.4%	+ 3.1%
Shaving Creams	+ 2.3	+ 5.1	+ 4.7
Pre-Shave Lotions	+ 5.4	– 6.5	– 3.0
After-Shave Lotions	– 2.3	– 12.5	– 3.4
Razor Blades	+ 5.9	+ 2.1	+ 3.9
Razors & Blades	+ 3.8	+ 10.4	+ 4.2
SKIN CARE AIDS	+ 9.7%	+ 0.8%	+ 27.3%
Hand & Body Creams & Lotions	+ 8.9	– 2.2	+ 20.4
Facial Preparations	+ 38.9	+ 20.5	+ 25.9
Lip Care Products	+ 16.7	– 2.0	+ 50.6
Suntan Lotions & Oils	+ 46.0	– 4.8	+ 3.5
Cosmetic & Medicated Skin Aids	– 1.1	– 4.3	– 6.2
TOTAL ALL CATEGORIES	+ 2.9%	– 1.4%	+ 2.6%

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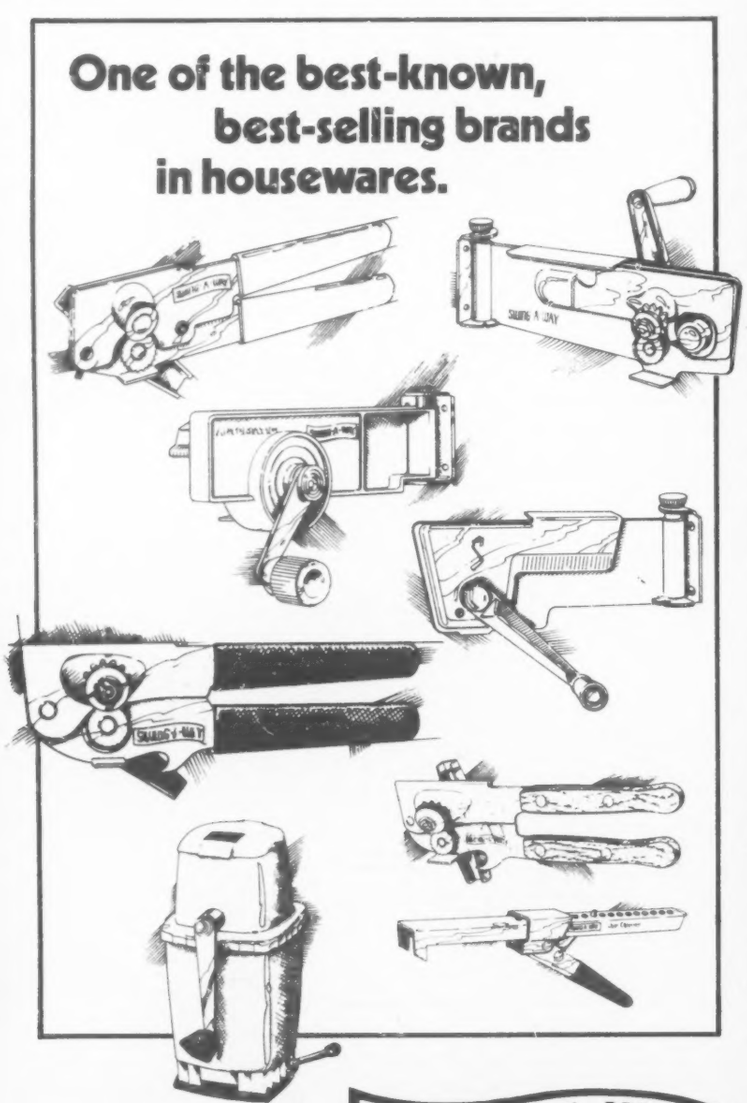

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